RANCH CAPITAL ADVISORS

Packages & Pricing

Dependable Advice.
Meaningful Results.

"THE PLANS OF THE DILIGENT CERTAINLY LEAD TO PROFIT"

Proverbs 21:5

Ranch Capital Advisors
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FIDUCIARY

Ranch Capital Advisors is an independent investment advisor registered with the SEC. We are committed to educating our clients and acting in their best interests. We are not in the business of selling investment products. It's our ethical responsibility to be trustworthy and act in good faith and honesty.

OUR MISSION

Our mission is to be the most trusted source for dependable financial advice and deliver results that can benefit our clients in a meaningful way,

OUR VALUES

- Honor God
- Lead By Example
- Follow Through
- Tell It Straight
- Results Matter

TEAM APPROACH

We believe that tapping into someone's greatest strengths produces the best results. We offer a team approach when working with our clients. Every client is assigned at least one CERTIFIED FINANCIAL PLANNER™, an Investment Officer, and a Client Service Associate..

PACKAGES

QUICKSTART PLAN

Best for singles or couples who are beginning their wealth accumulation journey and are looking to receive advice, set goals, ask questions and create a financial plan with actionable steps.

ONE-TIME TOTAL FEE $1800
(PAID IN TWO 1/2 INSTALLMENTS)

- Basic Budgeting Tips
- Personal Wealth Tracker Website
- Debt Payoff Analysis
- Cash Flow Analysis
- Investment & 401k Analysis
- Insurance Needs Analysis
- Financial Independence Target
- Retirement Planning
- Education Funding
- Income Tax Review
- Estate Plan Review

Optional annual reviews of financial plan billed at $275 an hour.

FINANCIAL ADVICE, PLANNING & INVESTMENT MANAGEMENT (BUNDLED)

Best for singles or couples that have already accumulated a certain level of assets and want to get laser focused on their goals with ongoing financial and investment advice.

ANNUAL FEE OF 1.5%
total assets managed $250,000 to $500,000

ANNUAL FEE OF 1%
total assets managed $500,000 to $1 million

ANNUAL FEE OF .85%
total assets managed $1 million to $5 million

ANNUAL FEE OF .65%
total assets managed above $5 million

Minimum $250 a month fee if managed assets are below $250,000

Includes all services in the QuickStart Plan (**ONE-TIME FEE WAIVED**) **PLUS +**

- Proactive Portfolio Management
- Advanced Investment Strategies
- Tax Optimization Strategies
- Ongoing Financial Planning Advice
- Regular Financial Review Meetings
- Unlimited Access for Questions, Guidance, and Research
- Dedicated Fiduciary Team of Professionals
- Client Events

FINANCIAL COACHING

Best for anyone who wants to spend smarter and get laser focused on making the best use of their income. A personal "budget boot camp" lasting 6 to 12 months depending on need.

6 MONTH SUBSCRIPTION FEE
$275 PER MONTH

- Monthly Remote Accountability Meetings with a Financial Coach
- In-Depth One-On-One Training
- Financial Literacy Education
- Analysis of Monthly Expenses
- Personalized Budget Creation
- Savings Recommendations
- Target Spending Analysis
- Short & Long-Term Goal Planning
- Debt Elimination Strategies
- Emergency Fund Calculation